

ASIST 3.2.1 Drag and Drop Quick Reference Guide

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ASIST 3.2.1 Drag and Drop



ASIST 3.2.1 allows you to drag and drop files from Windows Explorer, the Windows desktop, or MS Outlook into ASIST folders directly. This functionality, however, requires a desktop plug-in to be installed on your desktop. Recently, this was performed automatically for all the desktops in Washington. For Mission users, please contact your EXO Systems personnel for assistance in ensuring the required plug-in has been installed.

When enabled, the plug-in allows you to drag and drop files into folders in the following ASIST locations:

- Inbox
- Attribute Browser
- Scanning Report (Voucher, Contract, Invoice, Payment Authorization)
- Pending Report
- CCB Report (Washington Users Only)
- Text Search Results
- Folder Attachments
- Advanced Search Results

In the above named locations you can drop files onto:

- A folder icon line:
 [USAID200700053](#) Documents associated with management contracts.
- The attachment type or sub attachment type line:

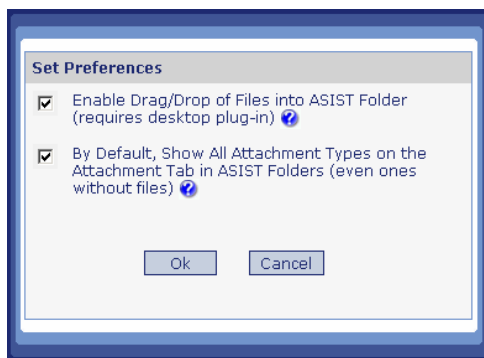
Other Supporting Documents	
 Senior Management Plan.txt	12/18/2006
 Junior Management Plan.txt	12/18/2006

The following sections cover how to set up your account for drag and drop and how to use it with ASIST. In addition, detailed instructions are provided in the last section of this document for those who need assistance in setting up their MS Windows applications and desktop to use drag and drop. Users accustomed to the normal MS Windows drag and drop functionality will find that they do not need the details in that section.

Enabling Drag and Drop

To enable the Drag and Drop feature, you must set a personal preference that indicates your workstation has the required plug-in and can use it. **We have enabled this option already for Washington users.** Mission users should perform these steps:

1. Open ASIST.
2. On the “ASIST Home” page, click on the link labeled Preferences.
3. In the resulting window, check the option labeled “Enable Drag/Drop of Files into ASIST Folder.



4. At this point you should be able to use the Drag and Drop functionality.
5. The option labeled “By Default, Show Attachments Types...” is also a new feature that permits easier population of folders using Drag and Drop. Checking this option will display all folder Attachment Types (the subsections on the Attachment tab for folders which organizes folders) regardless of whether or not any files have been added. This allows users to populate folders easily.

Using Drag and Drop

❖ Drag and Drop to a Folder Icon Line

! Note: Before you can use Drag and Drop in ASIST, you must set the personal preference that indicates your workstation has the required plug-in and can use it. Mission users may refer to the section **Enabling Drag and Drop** to set the preference.

To drag and drop to a folder icon line, perform the following:

1. Open up ASIST and navigate to a folder using any of these features:
 - ✓ Inbox
 - ✓ Attribute Browser
 - ✓ Scanning Report (Voucher, Contract, Invoice, Payment Authorization)
 - ✓ Pending Report
 - ✓ CCB Report (Washington Users Only)
 - ✓ Text Search Results
 - ✓ Folder Attachments
 - ✓ Advanced Search Results
2. Open Windows Explorer, Microsoft Outlook, or other MS Windows file interface (like the Windows Desktop). These are the 'source windows applications'. Navigate to the files or e-mail message you want to add to the ASIST folder.
3. Arrange ASIST and the source windows application adjacent to one another on the Windows desktop so you can drag from it on to the ASIST folder. If you need help laying out the windows so that you can do this, see the Section **Preparing Your Windows Desktop for Drag and Drop** at the end of this document.
4. Select the electronic document(s) from the source windows application.

! Note: You can select more than one document at a time. When adding files, you will be given the option to set all the properties the same for each file or be prompted to set them for each one.

5. Drag the document(s) onto the line of the folder to which you want to attach the document.
6. Drop the document(s) by releasing the mouse button (**Figure 1**). The folder line may flash to indicate the selected folder.



Figure 1: Drag and Drop a File onto Folder Line (Attribute Browser Example)

7. The Add Attachment window appears (Figure 2Error! Reference source not found.). Select all applicable information regarding the attachment to be added. The Attachment Type must be selected.

Add Attachment

File: D:\ASIST3.2.1CD-122206\Documentation\ASIST 3.2.1 Developers Notes.pdf

Name: ASIST 3.2.1 Developers Notes.

Folder ID: 699-C-00-05-00001

Content Type: [Select Content Type]

Attachment Type: [Select Attachment Type] *

Sub Attachment Type: [Select Sub Attachment Type]

Access Group: [NONE]

Keywords/Summary:

[Finish] [Cancel]

Figure 2: Add Attachment Details - Drag and Drop to Folder Icon Line

8. Press the **Finish** button to complete and add the files to the folder.
9. The first time you use the plug-in it will be slow and it will ask you for permission to run and install itself. Select the **Run** button on the screen below if prompted.

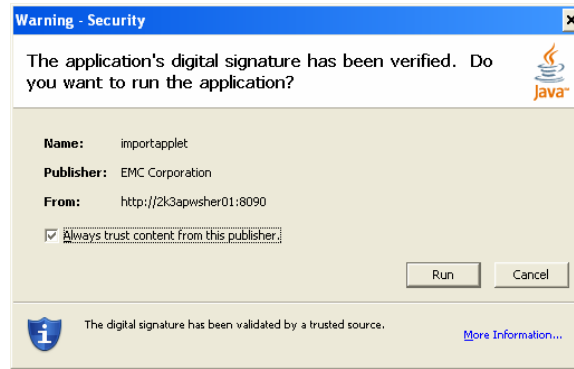


Figure 3: First Time Install Prompt

! Note: When adding files to the Browse views you may have to select the browser's refresh button in order to see the recently added documents.

❖ Drag and Drop to an Attachment Type or Sub Attachment Type

To drag and drop to an attachment type or sub attachment type, perform the following:

1. Select the electronic document(s) from Windows Explorer, the Windows Desktop, or Microsoft Outlook.

! Note: You can select more than one Document at a time. When adding files, you will be given the option to set all the properties the same for each file or be prompted to set them for each one.

2. Drag the document(s) onto the attachment type or sub attachment type header.
3. Drop the document(s) by releasing the mouse button (Figure 4). The attachment type or sub attachment type header may flash to indicate the type selected.

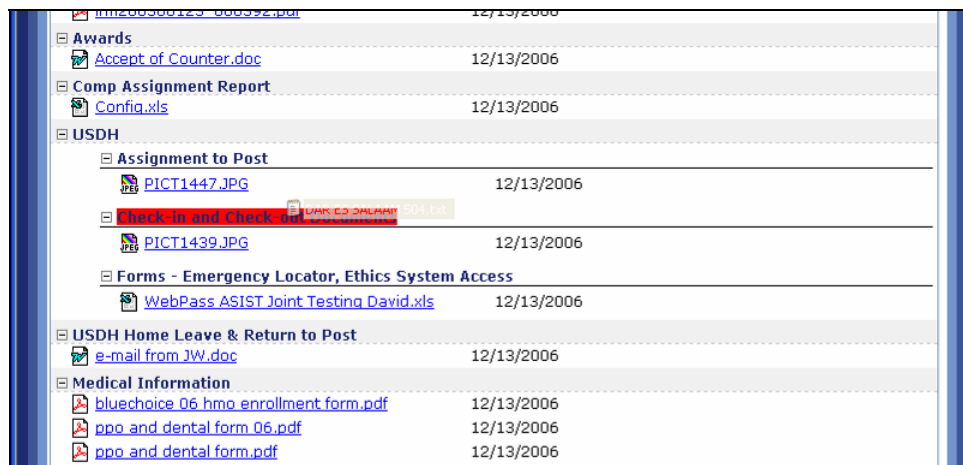


Figure 4: Drag and Drop a File onto an Attachment or Sub Attachment Type

4. The Add Attachment window appears (Figure 2). The Attachment Type is pre-populated. If the document was dragged to a sub attachment type, the Sub Attachment Type is also pre-populated. Select all other applicable information regarding the attachment to be added.
5. Press the **Finish** button to complete and add the files to the folder.

Preparing Your Windows Desktop for Drag and Drop

To effectively drag and drop files from a windows application into ASIST you will need to line up the windows next to each other, or so that they can overlap slightly but still show the ASIST target folder. Users can employ whatever method they are comfortable with to arrange the windows. The below is one example using MS Outlook.

1. Open ASIST by clicking on the ASIST Icon.
2. Navigate to the ASIST folder where you want to add the file(s) into.
3. Open MS Outlook.
4. Resize MS Outlook so it can fit on the desktop adjacent to or slightly overlapping the ASIST window.
5. If either application is covering the full screen, locate the title bar at the top of the window and double click it. This will “resize down” the window to a smaller size. If the application window is still too big but not completely filling the screen, resize the window so that it can fit on the user’s desktop beside or slightly overlapping the ASIST Window.
6. To resize MS Windows applications, place the point of your mouse cursor over any of the thin window borders, or corners, until the cursor changes to arrows.

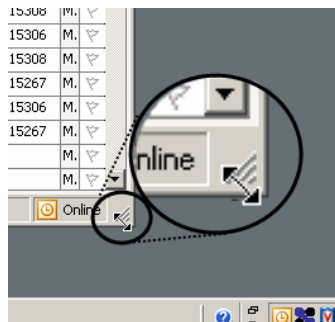


Figure 5. Cursor Position to Resize Window.

- Click the left mouse button and hold it down while dragging the window's border to the desired size.

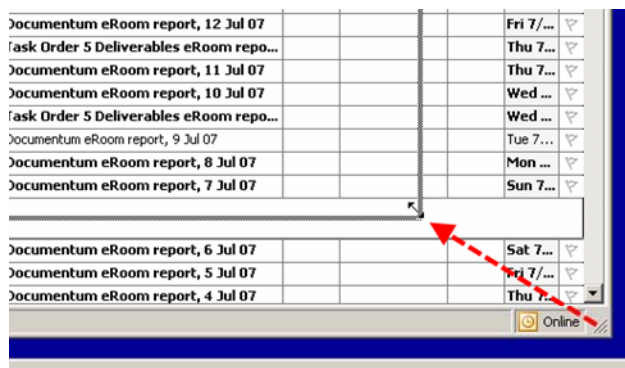


Figure 6. Holding Down the Left Mouse and Resizing a Window

- Repeat the resizing of both ASIST and MS Outlook windows so that you can grab e-mail messages in MS Outlook and drag them onto your ASIST Folders.
- If you need to move the windows on your desktop to arrange them, click and hold down the left mouse button in the window's title bar. Then while holding down the mouse button move the mouse to relocate the window on the desktop.
- Your Windows Desktop should resemble something similar to one of the following for drag and drop to work:

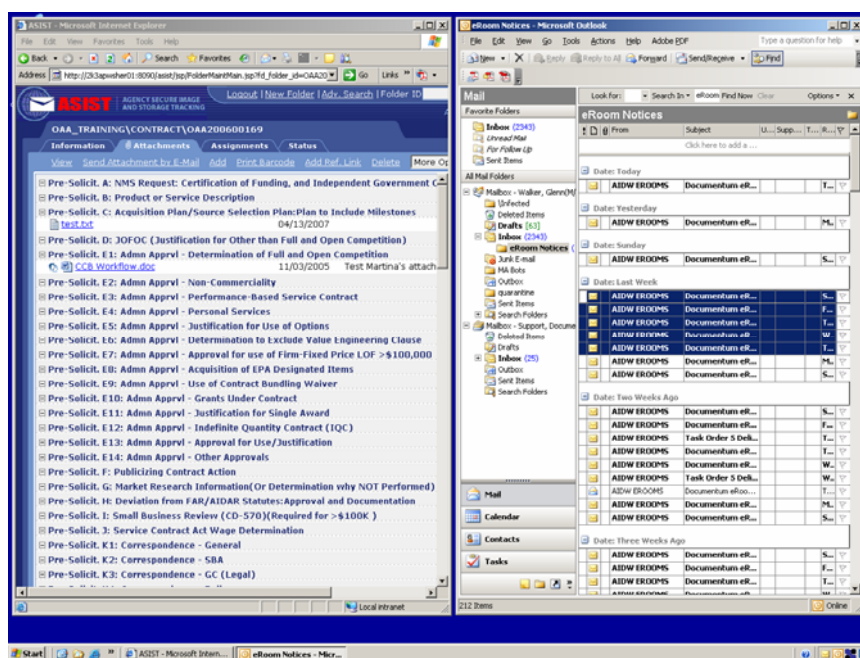


Figure 7. ASIST Next to MS Outlook. Messages Selected and Ready to Drag into ASIST (ASIST shown with user preference on for showing empty Attachment Types)

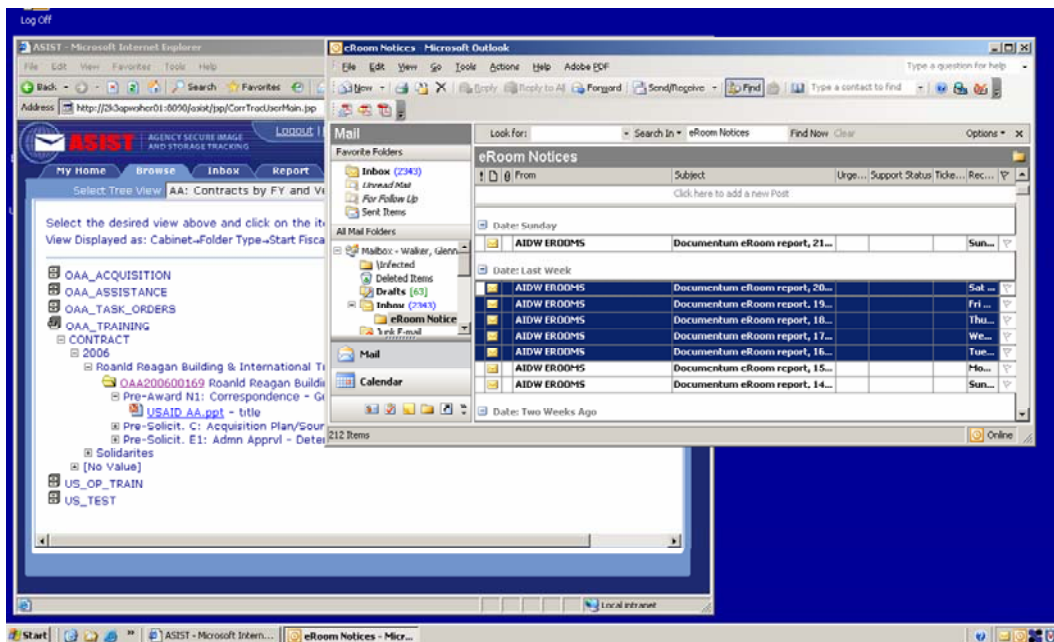


Figure 8. MS Outlook Overlapping ASIST. Messages Selected and Ready to Drag into ASIST Folder

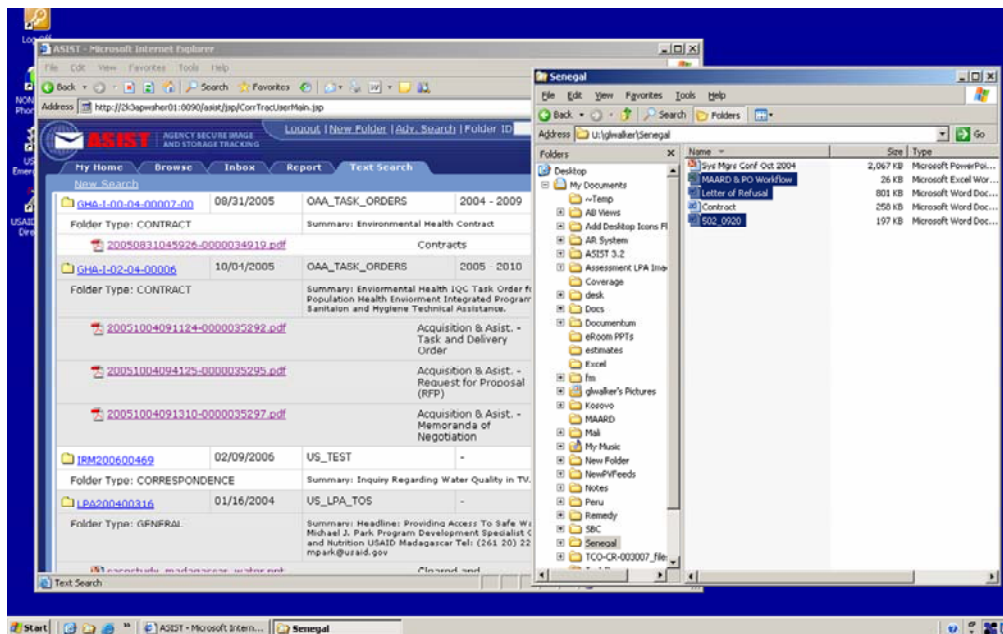


Figure 9. Windows Explorer (My Documents) Overlapping ASIST Search Results. Ready to Drag Files From My Documents into ASIST Folders